

PROJECT OVERSIGHT REPORT

Comprehensive Assessment Reporting Evaluation (CARE)
Department of Social and Health Services

Report as of Date:
April 2003

Project Director: Daniel Knutson-Bradac
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Executive Sponsor: Penny Black

Description: The Comprehensive Assessment Reporting Evaluation (CARE) project will develop a new system to enable consistent, accurate, and efficient client assessments and plans for adult Medicaid clients in need of long-term care. The goals of the project are to: ensure correct eligibility determinations are made for corresponding benefits; establish a standard and consistent case management process that will ensure accurate assessments and client care plans; and, provide a formal assessment of risk indicators to reduce liability and protect vulnerable adults. CARE will replace an older Visual Basic and Access-based system developed by the Department of Social and Health Services' (DSHS) Aging and Adult Service Administration (AASA).

AASA has contracted with Deloitte Consulting for the development of the CARE system on a deliverables-based, fixed-price basis for \$2.965 million. Deloitte spent five years designing, developing, testing, and implementing a Comprehensive Assessment system for the State of Oregon. Since AASA's business requirements match those of Oregon, the development of CARE will be based upon a transfer of Oregon's design. AASA has contracted with Starling Consulting Inc., for external Quality Assurance.

The phases are:

- Phase I (AASA & Deloitte) – Phase 1 project management plan, technical requirements, business requirements, preliminary design, and Phase II Project management plan.
- Phase II (AASA & Deloitte) – Final design, development, and testing.
- Phase III (AASA only) – System implementation.

Technology: Oregon's system was developed using PowerBuilder, a software technology new to AASA. Therefore, the decision was made to transfer Oregon's design and Deloitte's methodology and knowledge to AASA, but use JAVA and Microsoft SQL Server database technologies to develop the system. Both DSHS and Deloitte have extensive knowledge of these tools.

Life Cycle Stage: Phase II – Completed on time and on budget. As of April 1, 2003 AASA is in Phase III – System Implementation and Statewide Rollout. This phase and full project implementation are scheduled to be complete by the end of December 2003.

Budget: The five-year lifecycle cost for the project is \$6.7 million. Of this amount, \$2.965 million is allocated to the Deloitte Consulting contract scheduled through March 2003. AASA staff costs for the first year are projected at \$1.162 million. As of December 2003, the budgeted and actual Deloitte expenses were \$2,994,250.

The original project cost estimate was \$2.965 million; the total after contract negotiations was \$2.798 million. During the initial design phase, five additional requirements were identified and approved for development during Phase II. The cost was increased \$168,000 for a revised total of \$2.966 million. The additional \$28,000 expended was from the project contingency fund.

Phase II: Deliverables, Cost, Schedule, and Status

Deliverable	Payment Schedule	Delivery Schedule	Status
Task 1: Project Management	July 22, 2002 – March 31, 2003		
Phase II Project Management Plan	\$97,300	Aug 16, '02	Completed on time
Task 2: Design CARE	July 22, 2002 – September 27, 2002		
Data Model Definitions Document	\$373,800	Sept 13, '02	Completed on time
Technical Design Document	\$373,800	Sept 27, '02	Completed On time
Task 3: Develop CARE	September 2, 2002 – January 3, 2003		
Unit Tested Washington CA/P Software Components	\$514,200	Nov 15, '02	Completed on time
Completed Program Specifications	\$409,200	Nov 29, '02	Completed on time
Task 4: Conduct CARE Testing	October 7, 2002 – February 28, 2003		
Washington CA/PS Test Plan	\$303,800	Oct 18, '02	Completed on time
System Tested Washington CA/P Software Components	\$334,600	Jan 3, '03	Completed on time
User Acceptance Tested Washington CA/P Software Components	\$139,200	Feb 28, '03	Completed on time
Task 5: Plan for Pilot & Implementation	September 23, 2002 – December 13, 2002		
Pilot and Implementation Plan	\$39,900	Dec 13, '02	Completed on time
Subtotal (Phase II):	\$2,585,800		

Status: The project finished the first phase and the second phase (all five tasks listed above) of the project on schedule and on budget. This is a fixed price contract.

The system has cleared User Acceptance Testing (UAT) and has been accepted by AASA.

Although not a planned deliverable, Deloitte developed and delivered a transition plan to AASA that identifies skills, resources, and timelines necessary for the implementation phase. Implementation is the responsibility of AASA since AASA did not contract with Deloitte for this phase.

Issues: The contract with Deloitte Consulting ended March 31, 2003. The following issues pertain to Phase III – System Implementation and Statewide Rollout, which is the sole responsibility of AASA:

- Implementation plan: Although Deloitte has delivered a pilot and implementation plan as required, AASA has limited experience rolling out a system of this magnitude and complexity. The plan calls for two regions to be implemented at a time until all are operational. The implementation plan should contain a contingency for switching to a less aggressive implementation approach if AASA encounters significant problems. It should also include the criteria by which the decision will be made to switch to this alternate approach as well as the criteria for switching back to the original schedule.
- Ongoing support: Five AASA staff personnel are now responsible for all ongoing support, maintenance, and enhancement of the CARE system. The chief architect of the system provided two weeks of JAVA training in February and March to 12 AASA programmers. However, there is no budget for drawing upon Deloitte personnel if technical assistance is needed. As part of its contingency plan to increase support for the system during Phase III, AASA has contracted with one of the database administrators who worked as a subcontractor to Deloitte Consulting.

Recommendation: This continues to be a well-managed project. ISB oversight staff recommends that AASA continue reviewing and modifying its contingency plan to address the issues identified above.